

**Monthly Report to the Special Trustee
Office of Trust Litigation Support and Records
August 2000**

Following are highlights of records management activities performed by the Office of Trust Litigation Support and Records during August 2000.

STAFFING

- ❖ **Management Analyst positions** (develops and implements records management policies, retention schedules; training curricula and aids, etc.)
 - Fourth position filled
 - One supervisory position to be classified and advertised
- ❖ **Records Management Specialist positions** (implements records management program, BIA disposition backlog, records cleanup, etc.)
 - Recruitment action underway for three vacant positions (resulting from administrative transfers of employees into management analyst positions)
 - One supervisory position to be classified and advertised
- ❖ **Archives Technicians positions** (searches for refiled or interfiled records; receives, moves, and shelves records; inventories records)
 - One position remains vacant

TRAINING

- ❖ **BIA:** Presented Mid-level management records awareness briefings to 153 employees at the following BIA locations:
 - Pacific Regional Office—29
 - Central California Agency—10
 - Hoopa/Northern California Agency—6
 - Laguna Agency—10
 - Southern Ute Agency—4
 - Ute Mountain Ute Agency—7
 - Zuni Agency—8
 - Ramah/Navajo Agency—3
 - Eastern Regional Office—13
 - New York Field Office—2
 - Umatilla Agency—12
 - Yakama Agency—23
 - Spokane Agency—15
 - Colville Agency—11
- ❖ **OTLSR:** Staff attended the following training:
 - Indian Probate—3 employees
 - Electronic Records Issues—2 employees
 - Basic Records Operations, Files Improvement and Disposition—2 employees

CONTRACTORS

- ❖ **Iron Mountain Records Management Services Contract**—transfer, rebox, inventory, and prepare records for transfer to appropriate storage
 - Ft. Peck Agency—450 boxes with approximately 300 inventoried

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- Northern Cheyenne Agency—200 boxes
- Rocky Mountain Regional Office—240 additional boxes
- Ft. Belknap—420 boxes transferred to staging warehouse in Billings
- Regionwide—approximately 380 boxes of general and administrative records waiting implementation of General Records Schedule
- OTLSR (Hawkins)—480 boxes prepared for local and Federal Records Center storage

OTHER WORK

❖ **Disposition Backlog at BIA Locations**

- Worked with BIA locations to approve and transfer records to Federal Records Centers
 - Rocky Mountain Regional Office—358 boxes
 - Crow Agency—74 boxes
- Worked onsite at Rocky Mountain Region (see summary under Contractors above)
- Visited the following 14 BIA locations to assess current records storage requirements, inactive records disposition backlogs, and records transfer to appropriate storage facilities
 - Pacific Regional Office
 - Central California Agency
 - Hoopa/Northern California Agency
 - Laguna Agency
 - Southern Ute Agency
 - Ute Mountain Ute Agency
 - Zuni Agency
 - Ramah/Navajo Agency
 - Eastern Regional Office
 - New York Field Office
 - Umatilla Agency
 - Yakama Agency
 - Spokane Agency
 - Colville Agency

❖ **Systematic Centralization of OST Financial Trust Records**

- Worked with OST field locations to inventory, pack, and transfer IIM on-going work to OST records facilities in Albuquerque

❖ **Develop and Issue BIA/OST Records Manuals, Training Aids and Provide Technical Assistance**

- Reviewed records training video and master technical leaflets
- Provided on-going technical assistance to various BIA offices

❖ **Initiate Action to Replace Historical Records with Working Copies**

- Met with Southwest Regional Office to access water rights records as potential pilot project
- Obtained preliminary information from service providers

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❖ **Award New Contract for OST Imaging**

- Pre-award conference for potential bidders held on August 25, 2000—more than 40 individuals participated in the conference

❖ **Complete Vital Records Plan**

- Awarded contract to commercial vendor to develop plan for BIA/OST trust records

❖ **Records Control Schedules**

- Finalized General Records Schedule items applicable to 16 BIAM; preparing transmittal letter
- Established “game plan” for developing OST records schedule
 - Inventoried IIM jacket folders to identify IIM related records
 - Prepared IARM/OST/BIA inventory form

❖ **Establish Life Cycle Database (Inventory) for Trust and Other Records**

- Completed verification of SF-135s submitted from various NARA locations
- Obtaining missing SF-135s

❖ **Establish Pilot Project for Electronic Record Keeping**

- Preliminary meeting with OTFM and vendor to determine user requirements and possible system design

❖ **Begin Cyclic Evaluation of Records Programs**

- Conducted records program evaluations at the following BIA locations
 - Pacific Regional Office
 - Central California Agency
 - Hoopa/Northern California Agency
 - Laguna Agency
 - Southern Ute Agency
 - Ute Mountain Ute Agency
 - Zuni Agency
 - Ramah/Navajo Agency
 - Eastern Regional Office
 - New York Field Office
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